



## Quick Reference Guide For HR Specialists

### How to Login to eOPF

1. Access the eOPF production URL in MS IE (<https://eopf.nbc.gov/doc/>).
2. The eOPF User Agreement page will display
3. Read and click *Accept* to the User Agreement
4. Type your **User ID** and **Password** in the field (first time users see #8)
5. Your Server and Agency Name should appear by default
6. Click the **Submit** button
7. The *eOPF Welcome* page opens
8. The first time you login click on *New User-Request Your Password* to set your Password. Your password must be 8 characters including at least one upper-case letter, one lower-case letter, one number and one special character.

### Viewing the Full Screen

1. Expand your window to view Full Screen by clicking on the “maximize” button in the top-right corner of the eOPF window

### Viewing your eOPF Document

Click **My eOPF** on the eOPF main menu.

From the **Search Results** page{ XE "results list" }, search for the eOPF document you would like to view.

1. From the *Annotation* drop-down list located at the top of the screen, select whether you wish to view the document with or without annotations.
2. Click the **Action** icon for the document you

want to view. Select **View** from the drop-down list. Open the document in Adobe Acrobat.

3. If the document contains multiple pages, use the *Next Page* and *Previous Page* buttons located in the document viewer to navigate through the document as necessary.
4. When you finish, you can *Close* the document by clicking on the small x in the upper right corner of the document viewer window, or close the viewer by clicking on the large red X in the upper right corner of the document viewer window.

### Searching for an eOPF

1. Click the **Search eOPF** button from the main menu on the eOPF application to query by fields such as SSN, Last Name, Activity Code, and Organization Code.
2. Enter your choice of field to search on, such as SSN, Form/Type, Last Name, First Name, NOA Code, Create Date, etc.
3. Once you enter the data into the search fields you want to use, click the **Search** button. The **Folder** page appears.
4. Click on the **Action** icon to the left of the document you want to see. Select an action option from the **Action** drop-down list. If this is not your eOPF, you must select a reason from the **Reason** drop-down list. If you select **Other** as the reason, you must type an additional description.

OR-

Click the **Show All Docs** button to list all documents that meet the particular search criteria.

**Note: The maximum folders to view is currently set to 30.**

### Searching for Folders by Name

1. On the search folders page enter all or part of the last name and/or first name fields and click the **Name Search** button.
2. Select the Name of the employee by clicking the corresponding radio button, then click

the **Select** button.

3. To view a document, click on the **Action** icon and then select **View** from the drop-down list.

### Annotating an eOPF Document

You may have been granted permission in eOPF to annotate documents.

1. Search for and open the desired eOPF.
2. From the **Reason** drop-down list, select a reason for viewing the document. Select **Annotate** from the **Action** drop-down list to the left of the document you wish to annotate.
3. Click the **New** button.
4. Select the **Yes** button if you want the Annotation to be private.
5. Select the annotation type of your choice from the tool list.
6. On the document page, use your mouse to add the desired annotation(s).
7. If you wish to add additional annotations with another tool, repeat the previous 2 steps with the new annotation tool.
8. When you finish adding annotations, click the **Done** button.
9. If you would like to add additional annotations to other pages, navigate to the next desired page using the **Next Page** and **Previous Page** buttons. Then, repeat Steps 2 - 3.

Click the **Exit** button to close the document view window.

### Creating a Clip Folder

You may have been granted permission in eOPF to create Clip Folders.

1. Perform a search for the desired folder(s) using the **Search Folders** page.
2. From the **Search Results** page, click on the Folder icon; select **Clip Folder** from the drop-down list

3. Enter a description for the Clip Folder in the **Description** field.
4. In the **Security** field, select either **Public** or **Private**.
5. Click the **Insert** button.
6. Click the **Back** button to return to the search result list.

### Adding Documents to a Clip Folder

1. Locate the document you wish to add to the Clip Folder. If this is not your own folder then you must select the reason for accessing a document from the **Reason** drop-down list.
2. Click on the **Action** icon to the left of your chosen document; select **Add to Clip** to add a document to the Clip Folder.
3. Click the **Select** button to add the clip to the Clip Folder.
4. Select the pages you want to add to the clip by checking the **Add Page to Clip** checkbox under each page you want in the paper clip, and then click the Submit button.

### Viewing Documents within a Clip Folder

1. Perform a search for the desired folder(s) using the **Search Folders** page.
2. From the **Search Results** page, select the reason for accessing the document from the **Reason** drop-down list.
3. Click the **Clip Folder** icon from the Folder drop-down list.
4. Click the **Detail** button next to the desired Clip Folder.
5. Click the **View Doc** icon to view the desired document in the Clip Folder

## Removing a Document from a Paper Clip

1. Use the **Search Folders** page to locate the desired folder(s).
2. Select the reason for accessing the document from the *Reason* drop-down list.
3. Click the *Clip Folder* icon.
4. Click the *Detail* button next to the desired Clip Folder.
5. Click the **Delete Doc** icon to delete the desired document from the Clip Folder.

## Printing an eOPF Document

1. Search for and open the desired eOPF document.
2. To prevent annotations from printing, ensure **View Documents Without Annotations** is selected from the **Annotation** field.
3. On the **Document View window**, click the **Print** button, or select File-Print from the Adobe Reader menu.
4. Ensure that your printer settings are correct.

**Note:** If you are printing a double-sided document, make sure that the printer selected is capable of performing duplex printing.

5. When you are done modifying the printer settings, click the OK button in the printer setup dialog box.
6. Click the Close button to close out of the document view window.

## Printing an Entire eOPF Folder

1. Click the **Print Folder** button on the eOPF menu.
2. In the **Enter SSN field**, enter the SSN matching the folder you wish to print, and click the submit button.
3. The **Verify Folder Information** page opens. The **Include Annotations** box will be unchecked because the default is set to print without annotations.

4. In the **Select Folder Side(s)** section, select the Folder(s) you want to print.
  5. From the **Printing Reason** drop-down list, select a reason for printing the folder.
  6. Click the **Print Double Sided** or the **Print Single Sided** button.
- Note:** If you select **Print Double Sided** mode, make sure that the printer selected is capable of performing duplex printing.
7. From Adobe Reader you can print the folder contents by clicking the **Print** button.
  8. Click the **Close** button to close out of the Adobe Reader.

Remove Documents from Folder

## To Remove a Document from an Employee's Folder

Search for and locate the eOPF document that you wish to remove. The *Search Results* page displays.

1. From the **Search Results** page, select a reason from the **Reason** drop-down list.
2. Select the **Delete** option from the document **Action** drop-down list

The page refreshes with a view of the document you selected to delete.

3. Click the **Delete Doc** button.

A Delete confirmation pop-up box displays. If you decide not to delete the document, click on Cancel.

4. Click the OK button if you wish to delete the document.

The Search Results page displays with the deleted document no longer listed. The deleted document is now found on the eOPF Deleted area.

## To Scan a Single-Sided Document into eOPF

1. Search for the folder where you will place the new document: use the eOPF **Search**

**Folders** page to find your employee.

2. From the **Folder** page, select the reason from the **Reason** drop-down list for working on the selected folder.
3. Click the **Folder Action** icon and select the Add Doc option from the drop-down list.
4. Place the document in the scanner according to the manufacturer's instructions.
5. After the scanning interface opens, click **Scan**.
6. Verify the **ISIS** checkbox is selected, and then click the button.
7. Select the appropriate scanner from the **Source** dialog box and click the **Select** button. The document appears.
8. Click the **Save** button.

## To Correct a Filing Error (Move a Document to Another Folder)

Use the **Search** feature to find the eOPF document that you wish to move to a different folder.

1. From the **Search Results** page, select a reason from the **Reason** drop-down list.
2. Click on the **Action** icon corresponding to the document and select the **Modify Index** option.

The *Modify Document Index* page appears.

3. Type the correct employee's SSN in the *SSN* field, and click the **Save** button. The **Move Document** confirmation box appears.
4. Click the **OK** button. The **Search Results** page reappears with the document moved.

## Moving Documents Between Folder Sections

Use the **Search** feature to find the eOPF document that you wish to move to a different section (permanent or temporary)

1. From the **Search Results** page, select a

reason from the **Reason** drop-down list.

2. Click the **Modify Doc Index** option associated with the document you wish to move.
3. Select the desired **Folder Section** from the *Folder* drop-down list, and then click the **Save** button. The **Search Results** page reappears with the folder section changed.

## Correcting Document Index Information

If you need to change the index information of a document, (e.g., if a mistake was made with indexing a newly scanned document) please follow the steps listed below:

1. Find the eOPF document that you wish to move to a different section.
2. Select a reason from the **Reason** drop-down list.
3. Locate the desired document, and then select the **Modify Document Index** option to modify the document index.
4. Modify the desired index information, i.e., Effective Date, Form Name, Form Type, Print, and then click the **Save** button.

## Where to get Help

For more information about eOPF, access the user guide after logging into the system by clicking on Help from any eOPF screen. FAQ's are also available from any eOPF screen.

If you require assistance in accessing the eOPF system, contact the eOPF Help Desk at [eOPF.helpdesk@usda.gov](mailto:eOPF.helpdesk@usda.gov) or 866.275.8518.

Please include the following: Name, Organization, Phone/email contact information, description of problem.

Refer eOPF content issues to the WFMO eOPF Points of Contact at:

[http://www.wfm.noaa.gov/eopf\\_contacts.html](http://www.wfm.noaa.gov/eopf_contacts.html)